SmartOffice Mobile for Palm User Guide

918 E. Green Street

Pasadena, CA 91106

Web -http-//www.ez-data.com

Telephone: (626) 585-3505
Fax: (626) 440-9097
U.S. toll-free fax: (800) 779-3123

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Introduction

SmartOffice Mobile for Palm is a custom application developed by E-Z Data to synchronize data between SmartOffice® and a Palm OS device. The application uses iAnywhere Solutions' Ultralite database and MobiLink Server to synchronize data without interfering with existing applications on the device.

The following record types can be synchronized:

- Contact – Individual

- Contact – Business

- Activity

- SmartPad

- Policies

- Investments

Installing SmartOffice Mobile for Palm

1. Log into SmartOffice.

2. From the side menu, click **User Setup** and **Installations** to open the Installations spreadsheet.

3. The **Installations** spreadsheet appears and displays all the available installations. From this spreadsheet, click the **SmartOffice Mobile for Palm and Pocket PC** link.

4. Select the **Click here to download and install SmartOffice Mobile for Palm** option to begin the installation file download.

5. From the File Download dialog box, click the **Open** button to start the installation. Alternately, the installation file can also be saved to the PC and installed from the saved location.
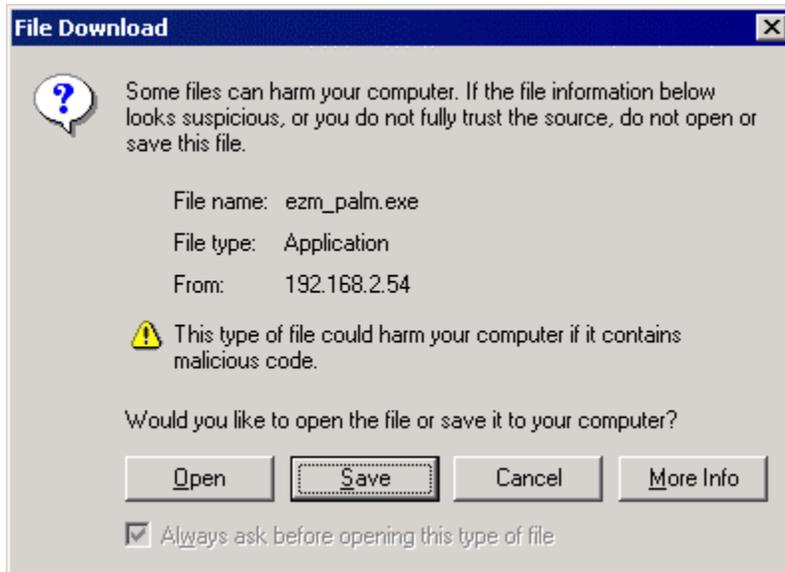
6. If the username assigned to the Palm device does not appear in the **User** field, click the down-arrow at the end of the field and select it before clicking the **Done** button.
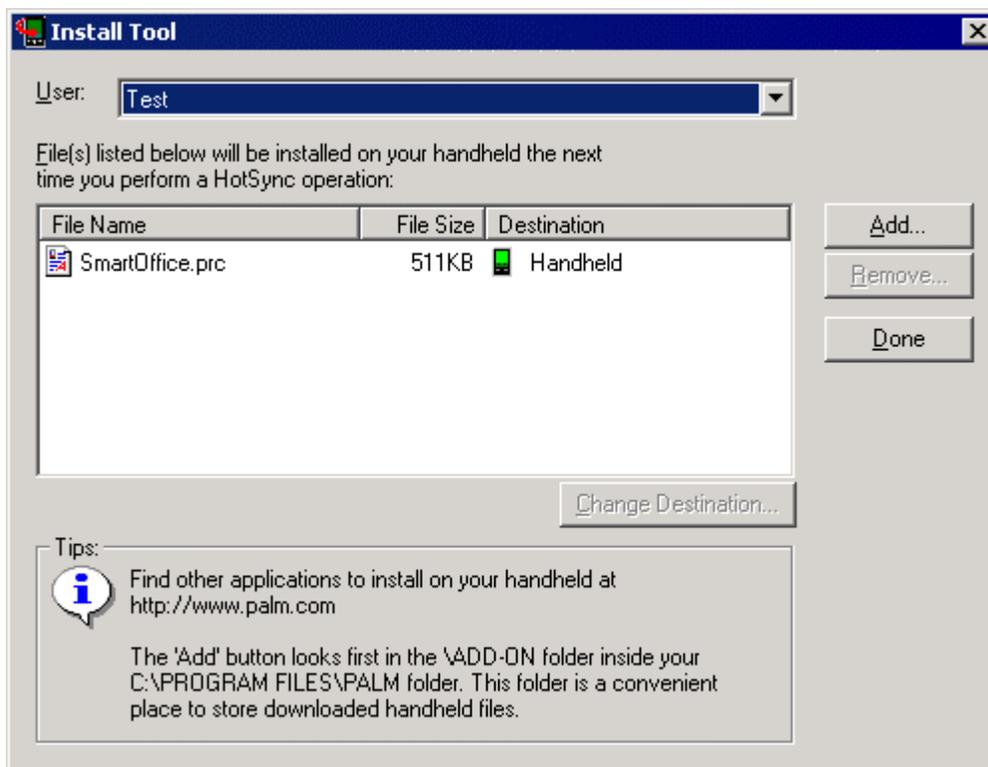
7. When prompted, begin a HotSync on the PDA to install SmartOffice Mobile. Once the HotSync is complete, click the **OK** button.

SmartOffice Mobile for Palm - InstallShield Wizard

Please install the SmartOffice Mobile for Palm program by performing a HotSync operation and then click OK to complete the installation.

OK

Setting Up SmartOffice Mobile for Palm

Accessing SmartOffice Mobile on the Palm OS® Device

To start SmartOffice Mobile, tap the **SmartOffice** icon.
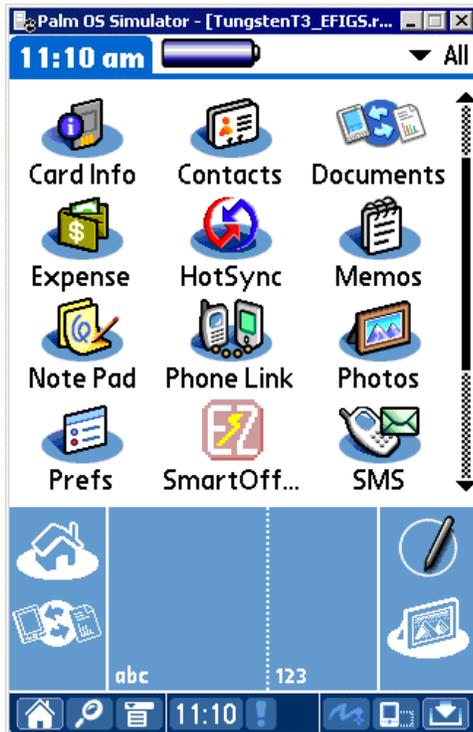
When launching SmartOffice for the first time, the **Security Information** window is displayed. The user will have the option to either enable or disable security for the device. Once security is enabled, the only way to remove it is to uninstall and reinstall the SmartOffice Mobile application.
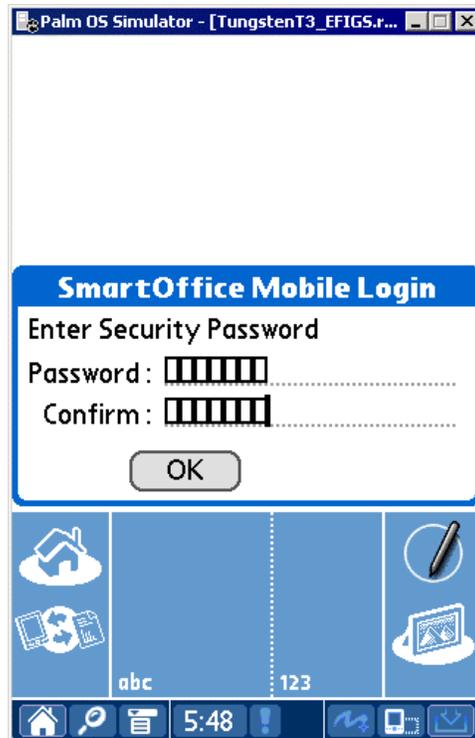
Click the **Yes** button to enable security and display the **SmartOffice Mobile Login** window. The password is required each time SmartOffice Mobile is launched. The password must be at least 6 characters with at least one alpha and one numeric character. The password can be changed at any time by accessing the Security Password option from the main SmartOffice Mobile menu. Once the password has been entered and the user taps the **OK** button, the **Synchronization Options** window opens.

SyncMethod: By default, the HotSync option is selected for use with a cable/cradle connected to a PC with Palm Desktop and the HotSync Manager installed. This option can be cleared for synchronization with a wireless enabled device.

Protocol: Select the communication protocol used to communicate with the MobiLink Server. The options are TCP/IP, HTTP, or HTTP using a web server. An additional checkbox is displayed when HTTP is selected. This information will be provided by E-Z Data for SmartOffice Online users and by the IT department of corporate implementations.

SmartOffice Login Information: The Office, User, and Password for accessing SmartOffice must be entered in the appropriate fields. To enter the password, tap the **Unassigned** box, enter and confirm the SmartOffice login password, and tap the **OK** button. The password now shows as **Assigned**. If the SmartOffice One Card System (eOCS) is being used with SmartOffice, select the **eOCS User** checkbox to enable One Card System Outcomes when tracking activities.

MobiLink Server Details: The host URL or IP address and port assigned the MobiLink Server must be entered in order to synchronize successfully. This information is provided by E-Z Data for SmartOffice Online users and by the IT department of corporate implementations.

Once the correct information has been entered on the Synchronization Options window, tap the **Done** button to save the information.

Setting Up SmartOffice Mobile Synchronization Criteria

1. From the side menu, click **Synchronization** and select **Mobile Device Setup** to launch the Synchronization Setup Wizard.

2. From the first window of the Synchronization Setup Wizard, click the **Next** button.

3. Choose to synchronize all contacts or selected contacts and click the **Next** button.
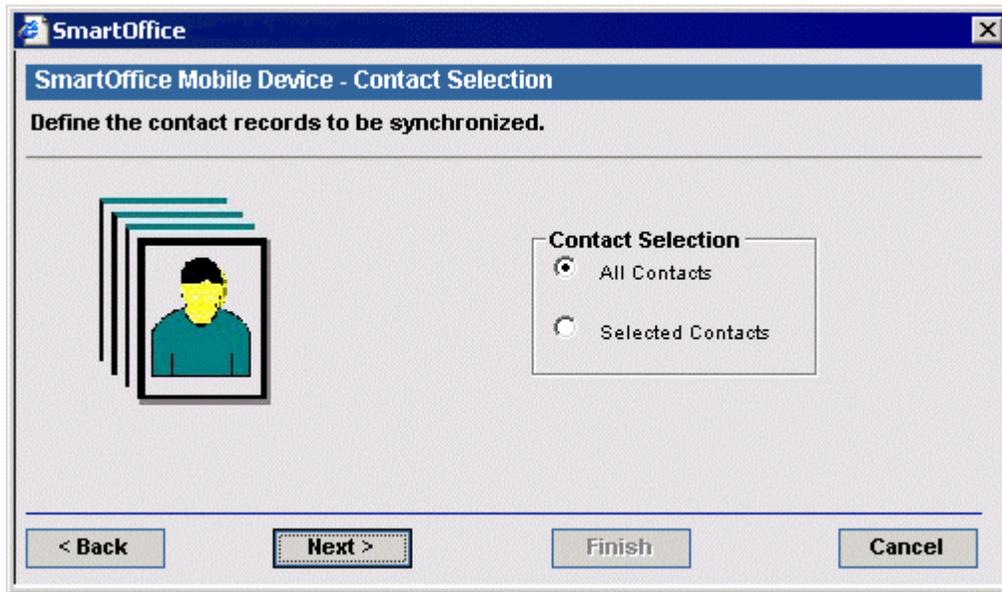
If All Contacts is selected, continue with step 4. Otherwise, the Filter/Set Selection dialog box opens. Select a set or filter of contacts to synchronize.

4. Select a date range of future and past activities for synchronization. Click the **OK** button to continue.
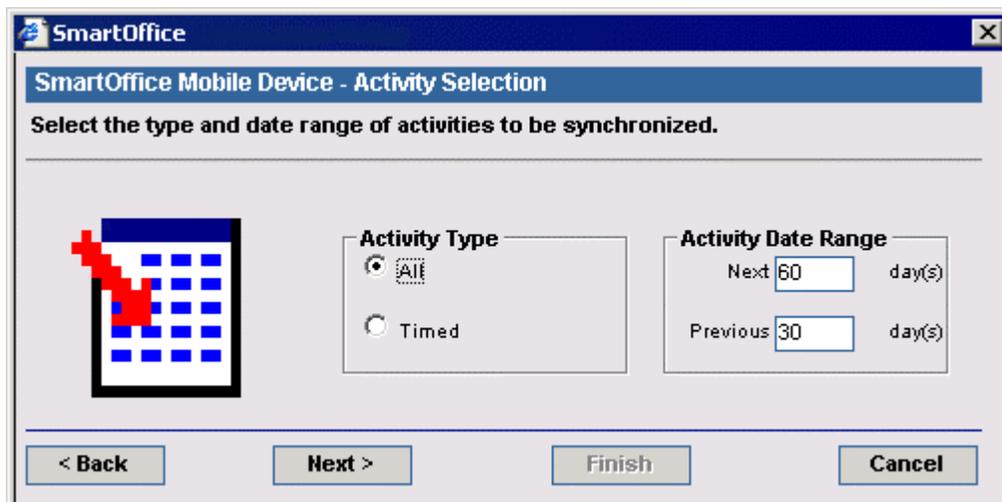
5. From the SmartPad Selection window, set the number of SmartPad entries to synchronize. Alternately, a range in months or just SmartPad entries manually added as notes can be synchronized.
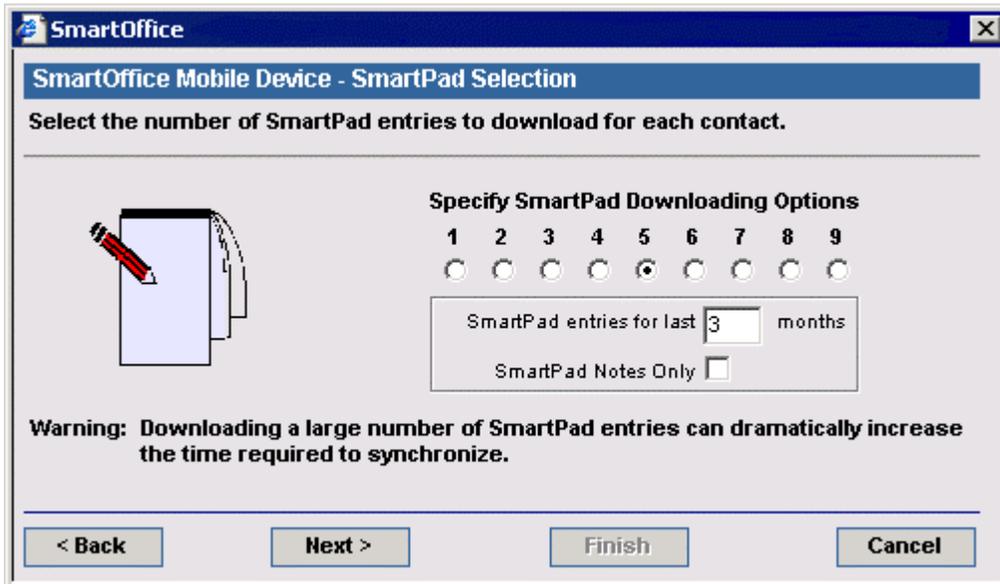
6. The final Synchronization Setup Wizard window is a review of the information selected for synchronization. If all of the information is correct, click the **Finish** button.
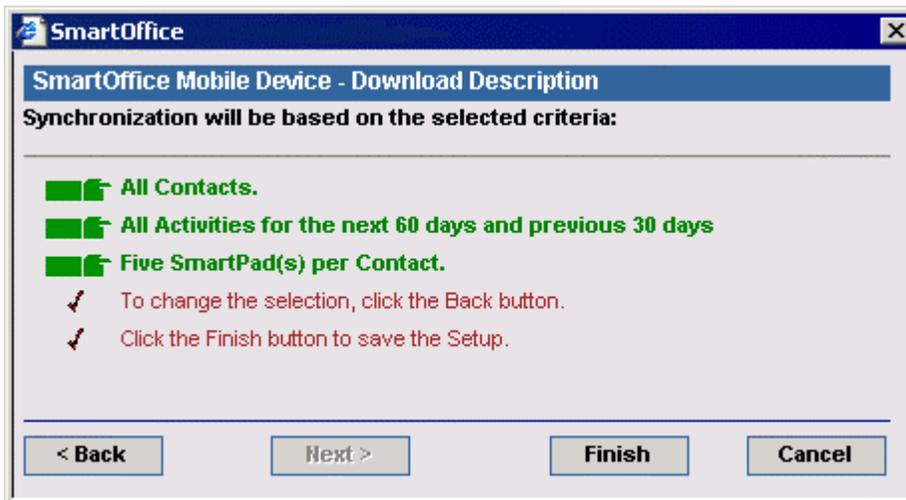
Preparing Data for Synchronization

After the criteria for synchronization has been selected, an initial synchronization must be done.

1. From the SmartOffice side menu, click **Synchronization** and select **Update Mobile Device** to open the Update Mobile Device with Changes dialog box.

2. Select the **Perform a full refresh of the data from SmartOffice** radio button to populate data meeting the synchronization criteria to a database table used for keeping track of the information that has been synchronized.

3. Perform a HotSync with the PDA to complete the initial synchronization.

After the initial synchronization, complete the following steps to add new information from SmartOffice:

1. From the SmartOffice side menu, click **Synchronization** and select **Update Mobile Device** to open the Update Mobile Device with Changes dialog box.

2. Select the **Update Mobile Device with new records and modifications** radio button to populate any additions made in SmartOffice to the database table so they will be synchronized on the next HotSync. Any data added or modified in SmartOffice Mobile on the PDA will automatically be added to SmartOffice on the next HotSync.

Using SmartOffice Mobile

SmartOffice Tab

Tap the **SmartOffice** tab to open a list of options.
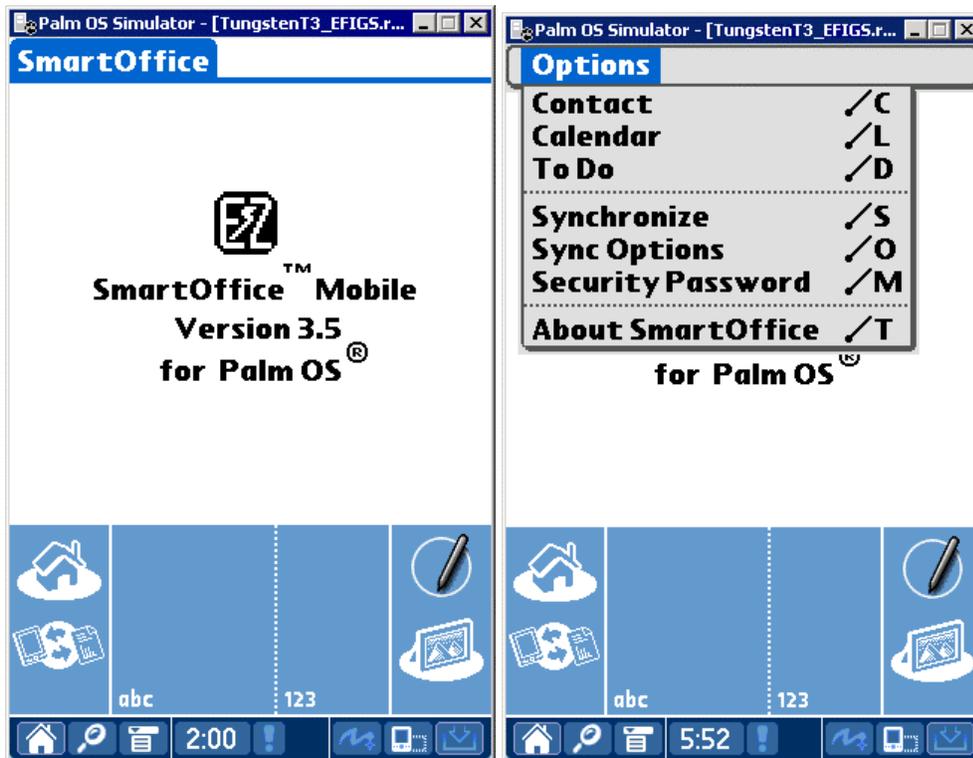
Contact Tab

From the **SmartOffice** tab, select **Contact** to open the Find Contact dialog box. There are three ways to search for a **Contact** (Individual or Business) record:

1. Tap the **Find** button without entering any search criteria to display the global Contacts list.
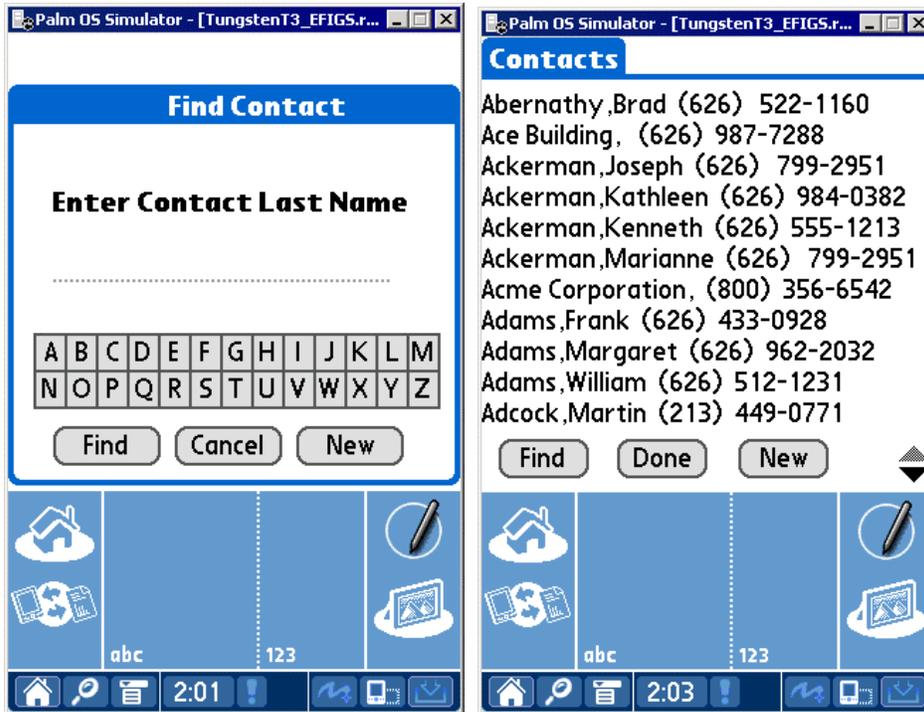
2. Enter a portion of the business name or individual contact's last name and then tap the **Find** button to display the **Contacts** tab matching the search criteria.
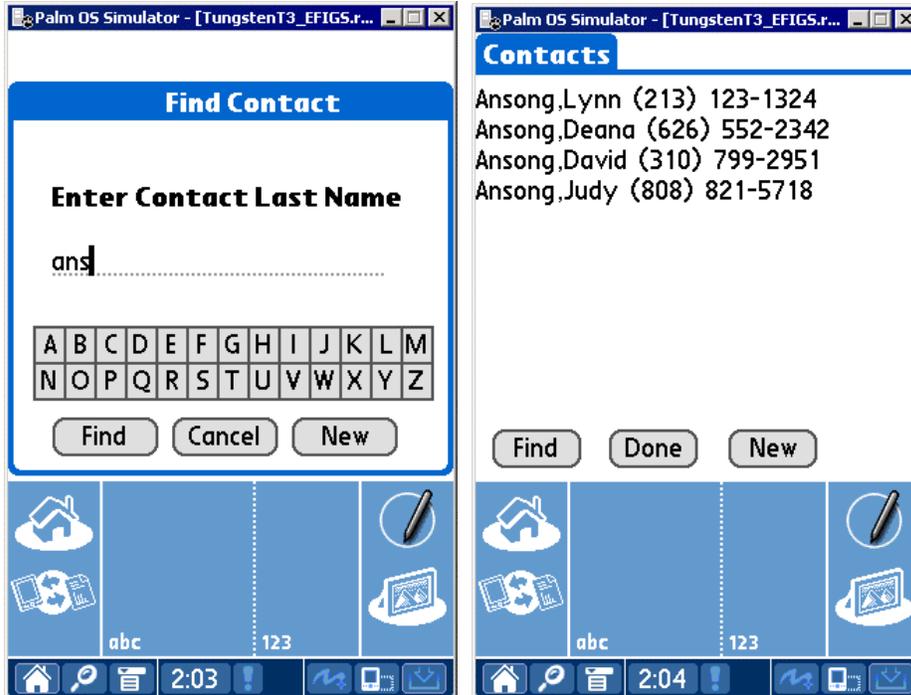
3. Tap the first letter of the business name or individual contact's last name to display the **Contacts** tab matching the search criteria.
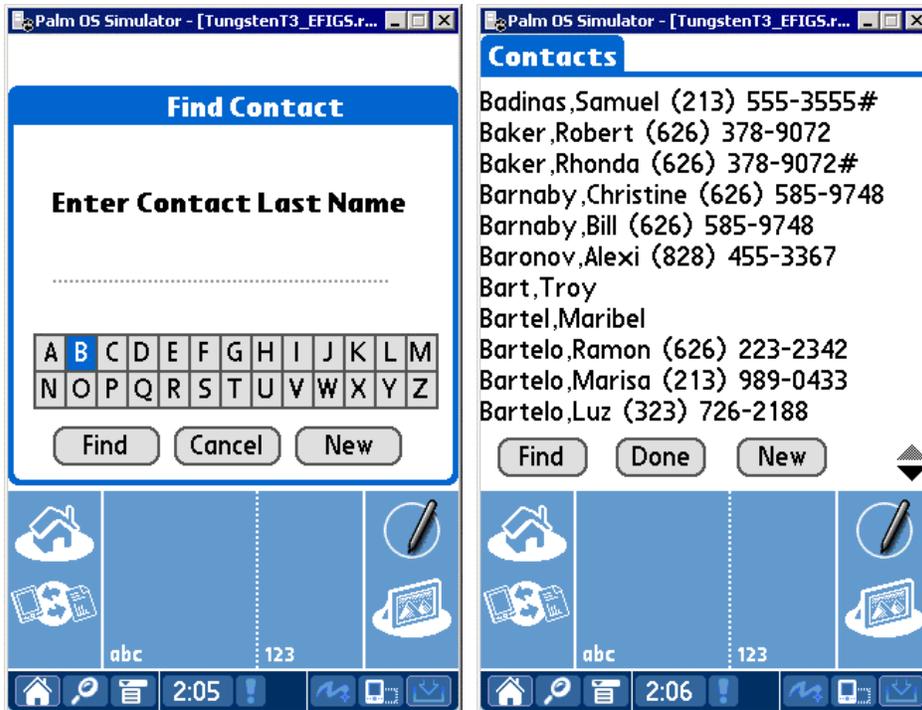
Creating an Individual Contact Record

1. From the **SmartOffice** tab, select **Contact** to open the Find Contact dialog box.
2. Tap the **New** button to open the Record Type dialog box.
3. Select the **Individual** option and then tap the **Done** button to display the **Details** tab.
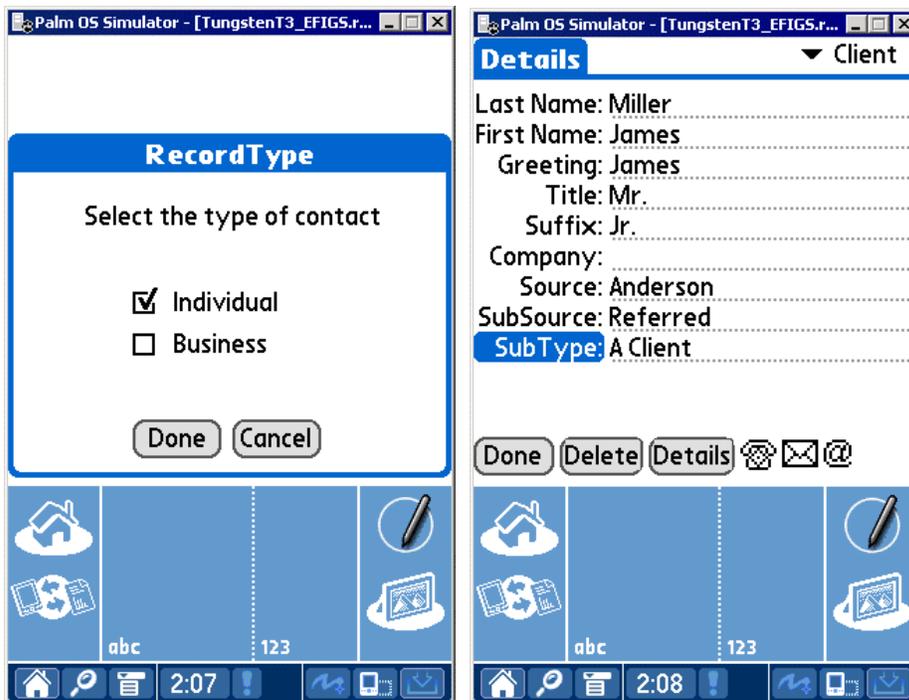
4. Enter the contact information and then tap the **Details** button as well as the **Phone**, **Address**, and **Web Address** icons to enter the corresponding information.

5. Tap the **Done** button to save the information and display the **Contact View** tab.
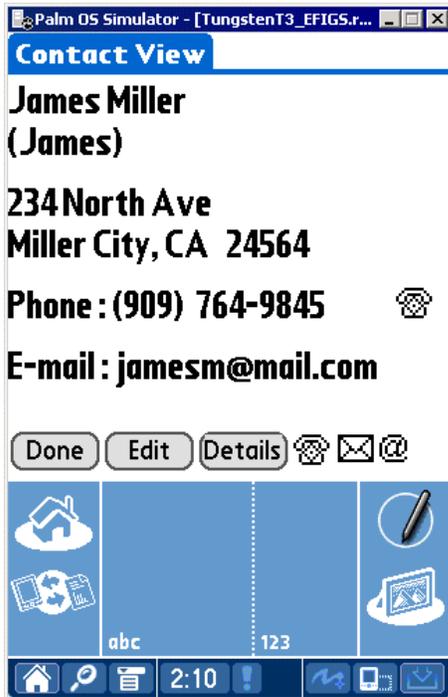
Contact Personal Dialog Box

1. From the **Contact View** tab, tap the **Details** button to open the **Contact Personal** dialog box.
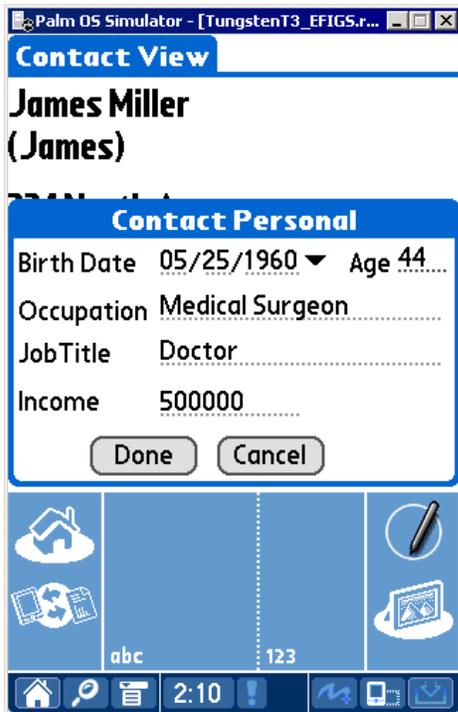
2. Enter the contact personal information and then tap the **Done** button to save the additions.

Contact Phone List

1. From the **Contact View** tab, tap the **Phone** icon to display the **Phone List** tab.

2. Tap the **New** button to open the Phone Details dialog box.
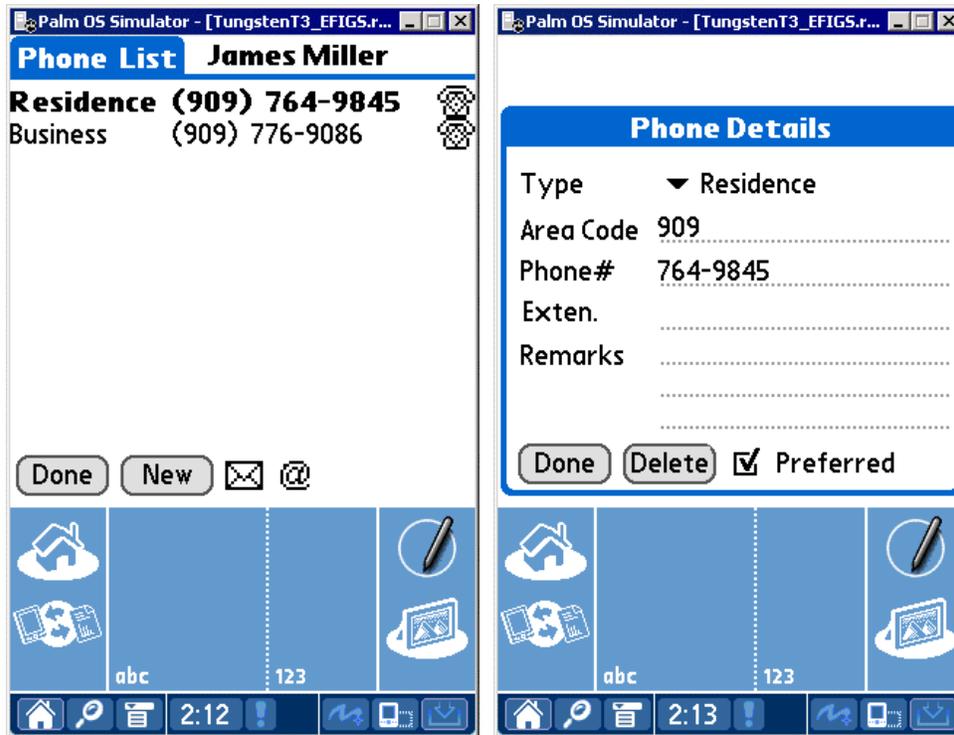
3. Tap the **Type** drop-down arrow to specify the phone type.

4. Enter the remaining phone information and then tap the **Done** button to save the additions.

Contact Address List

1. From the **Contact View** tab, tap the **Address** icon to display the **Address List** tab.

2. Tap the **New** button to open the Address Details dialog box.

3. Tap the **Type** drop-down arrow to select the address type.

4. Enter the remaining address information and then tap the **Done** button to save the additions.

   Note: Both the preferred Phone Number and preferred Address are displayed on the **Contact View** tab of the Contact record.

Modifying a Contact Record

1. From the **Contact View** tab, tap the **Edit** icon to open the **Details** tab.

2. Modify the information as necessary and then tap the **Done** button to save the changes.

Modifying a Contact's Phone Number

1. From the **Contact View** tab, tap the **Phone** icon to display the **Phone List** tab.
2. Tap the number for modification to open the Phone Details dialog box.
3. Modify the information as necessary and then tap the **Done** button to save the changes.

Modifying a Contact's Address

1. From the **Contact View** tab, tap the **Address** icon to display the **Address List** tab.
2. Tap the address for modification to open the Address Details dialog box.
3. Modify the information as necessary and then tap the **Done** button to save the changes.

Deleting a Contact Record

1. From the **Contact View** tab, tap the **Edit** icon to display the **Details** tab.
2. Tap the **Delete** button to open the **Delete Record** dialog box.
3. Tap the **OK** button to delete the selected record from the palm device and the server.
   Note: Perform a HotSync™ operation to synchronize the data.

Creating a Business Contact Record

1. From the **SmartOffice** tab, select **Contact** to open the Find Contact dialog box.

2. Tap the **New** button to open the Record Type dialog box.

3. Select the **Business** option and then tap the **Done** button to display the **Details** tab.
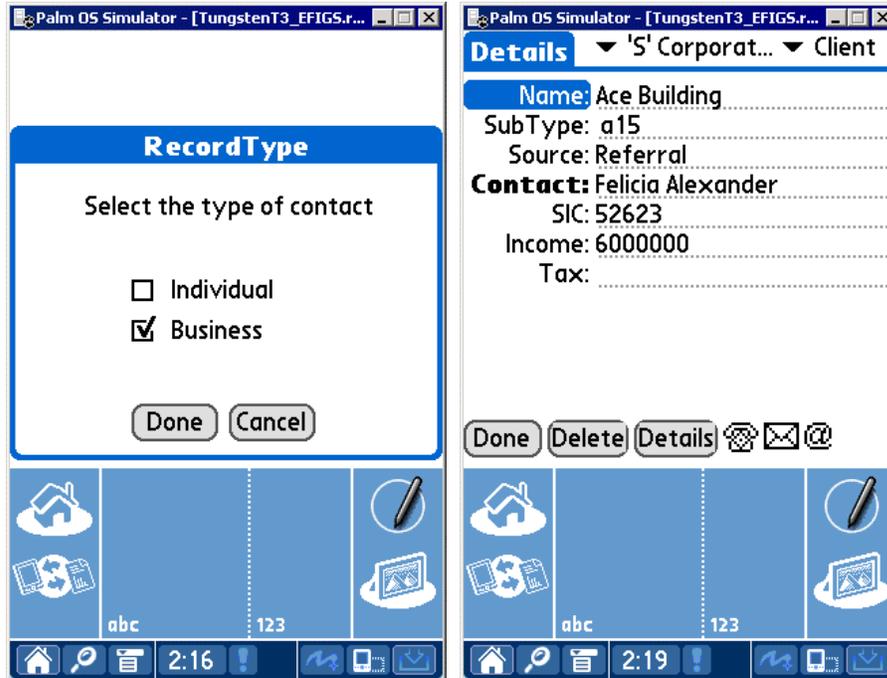
4. Enter the business information and then tap the **Details** button as well as the **Phone**, **Address**, and **Web Address** icons to enter the corresponding information.

5. Tap the **Done** button to save the information and display the **Contact View** tab.
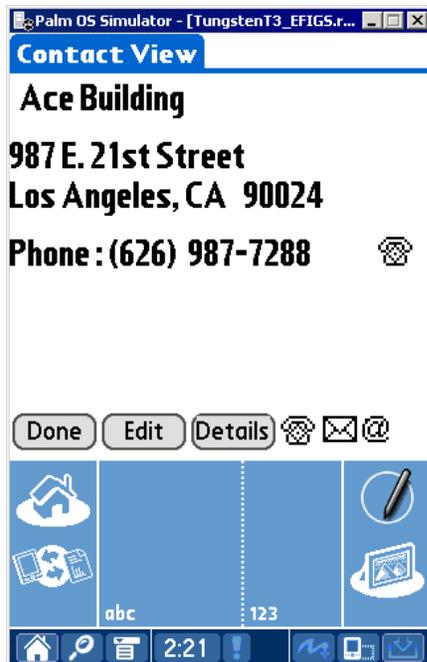
Contact Personal Dialog Box

1. From the **Contact View** tab, tap the **Details** button to open the **Contact Personal** dialog box.

2. Enter the business information and then tap the **Done** button to save the additions.

Business Phone List

1. From the **Contact View** tab, tap the **Phone** icon to display the **Phone List** tab.

2. Tap the **New** button to open the Phone Details dialog box.

3. Tap the **Type** drop-down arrow to select the phone type.

4. Enter the remaining phone information and then tap the **Done** button to save the additions.

Business Address List

1. From the **Contact View** tab, tap the Address icon to display the **Address List** tab.

2. Tap the **New** button to open the Address Details dialog box.

3. Tap the **Type** drop-down arrow to select the address type.

4. Enter the remaining address information and then tap the **Done** button to save the additions.

   Note: Both the preferred Phone Number and preferred Address are displayed on the **Contact View** tab of the Contact record.

Modifying a Business Record

Modifying a Business record is identical to the steps required in modifying an Individual Contact record. Please refer to the Modifying a Contact Record section.

Modifying a Business Phone Number

Modifying a Business phone number is identical to the steps required in modifying a Contact phone number. Please refer to the Modifying a Contact's Phone Number section.

Modifying a Business Address

1. From the **Contact View** tab, tap the **Address** icon to display the **Address List** tab.
2. Tap the address for modification to open the Address Details dialog box.
3. Modify the information as necessary and then tap the **Done** button to save the changes.

Deleting a Business Record

1. From the **Contact View** tab, tap the **Edit** icon to display the **Details** tab.
2. Tap the **Delete** button to open the **Delete Record** dialog box.
3. Tap the **OK** button to delete the selected record from the palm device and the server.
   Note: Perform a HotSync™ operation to synchronize the data.

Calendar

The **Calendar** views are: **DayView, WeekView, MonthView** and **AgendaView.**

DayView

From the **SmartOffice** tab, select **Calendar** to open the DayView calendar. The DayView is used to display the activities for a specific day. The activities of a previous or future day can be displayed by tapping the left or right arrows.
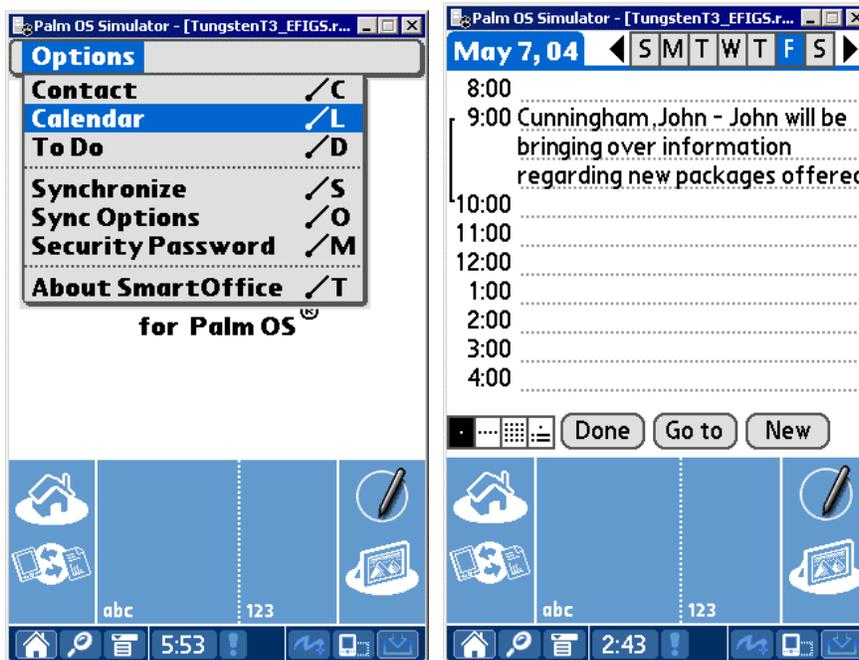
WeekView

The **WeekView** is used to view activities for a specific week. The activities of a previous or future week can be displayed by tapping the left or right arrows.
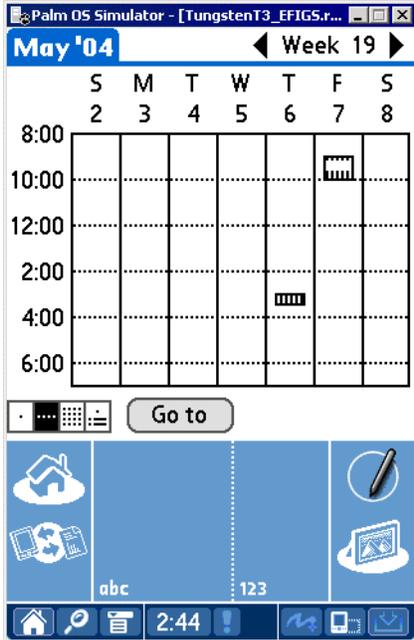
MonthView

The **MonthView** is used to display activities for a specific month. The activities of a previous or future month can be displayed by tapping the left or right arrows.

AgendaView

The **AgendaView** is used to display a combination of timed and non-timed activities for a specific day. The activities of a previous or future day can be displayed by tapping the left or right arrows.
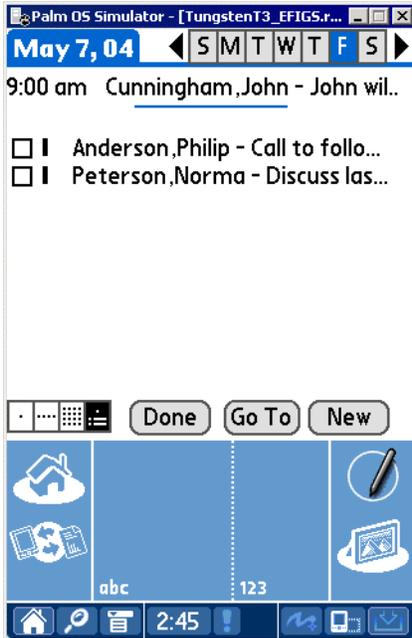
Adding an Activity from the Calendar

1. From the **DayView** calendar, tap the **New** button to open the **Activity Details** tab.

2. Enter the activity information and then tap the **Done** button to save the activity.

Activity Components

Time: Tap the **Time** button to specify the Start and End Time of an activity.

Contact: Tap the **Contact** button to link a contact to the activity.

Location: Enter the Location for the activity.

Type: Tap the **Type** drop-down arrow to display the activity type list.

Reason: Enter the Reason for the activity. If the reason takes up more than the space provided, tap the **Reason** button to open the **Details** tab and display the complete entry.

Done: Tap the **Done** button to save the activity.

Private: Select this option to designate the activity as private.

Tracked: Select the **Tracked** option to enter an Appointment into the Activity Tracking cycle.

Alarm: Select the **Alarm** option and then specify the amount of time before the activity to be reminded.

Priority*: Tap the **Priority Type** drop-down arrow to specify the priority.

Modifying an Activity from the Calendar

1. From the **SmartOffice** tab, select **Calendar** from the drop-down list to open the DayView calendar.

2. Tap the applicable activity to open the **Activity Details** tab.

3. Modify the information as necessary and then tap the **Done** button to save the changes.

Deleting an Activity from the Calendar

1. From the **SmartOffice** tab, select **Calendar** from the drop-down list to open the DayView calendar.

2. Tap the applicable activity to open the **Activity Details** tab.

3. Tap the **Delete** button to display the confirmation dialog box.

4. Tap the **OK** button to delete the activity.

To Do

From the **SmartOffice** tab, select **To Do** from the drop-down list to open the non-timed activities list.
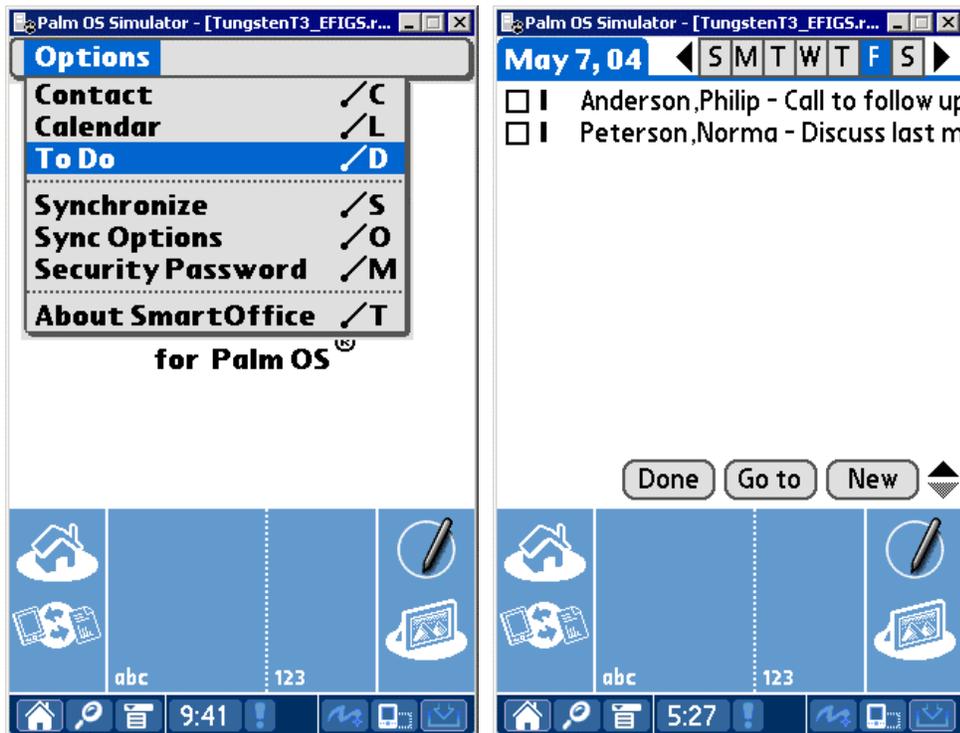

Adding a To Do Item

1. From the **SmartOffice** tab, select **To Do** from the drop-down list to open the non-timed activities list.
2. Tap the **New** button to open the **Activity Details** tab.
3. Enter the non-timed activity information and then tap the **Done** button to save the activity.

Modifying a To Do Item

1. From the **SmartOffice** tab, select **To Do** from the drop-down list to open the non-timed activities list.
2. Tap the applicable To Do item to open the **Activity Details** tab.
3. Make the modifications as necessary and then tap the **Done** button to save the changes.

Deleting a To Do Item

1. From the **SmartOffice** tab, select **To Do** from the drop-down list to open the non-timed activities list.

2. Tap the applicable To Do item to open the **Activity Details** tab.

3. Tap **Delete** to display the confirmation dialog box.

4. Tap the **OK** button to delete the To Do item.
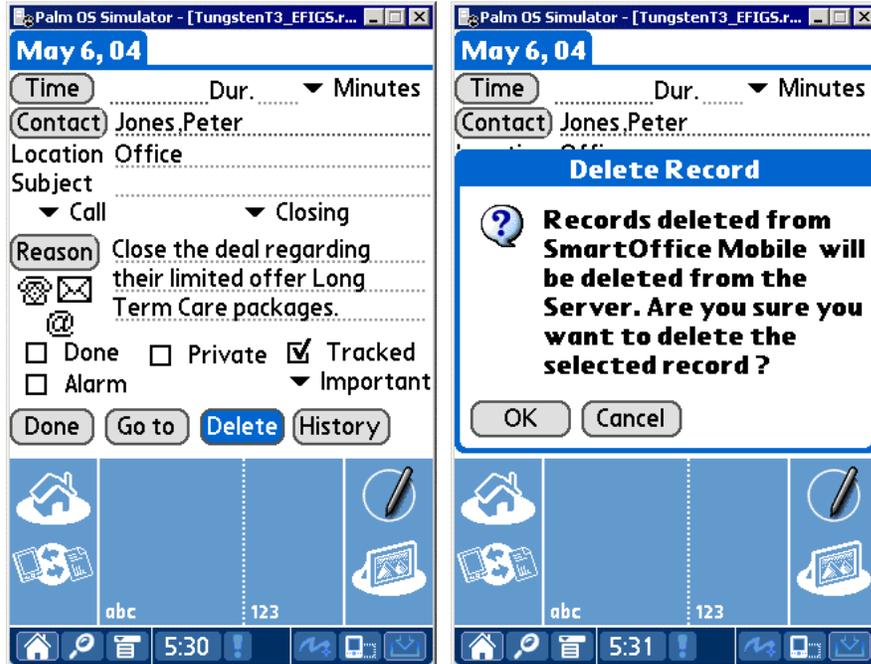
Contact Menu

From the Contact View, tap the **Contact View** tab to display the modules drop-down list.
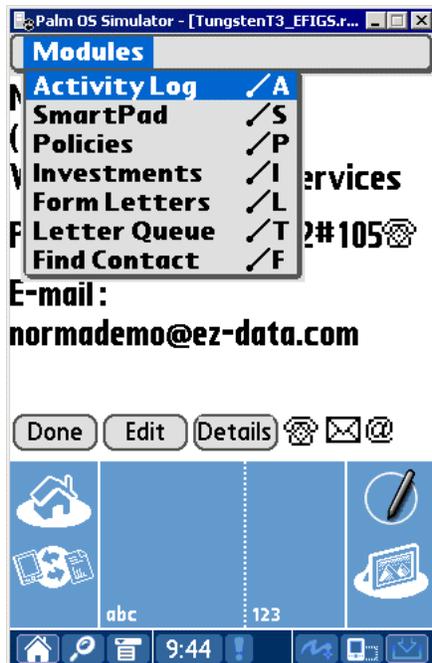
Activity Log

The Activity Log is a list of the activities linked to a particular contact that is used to display, add and modify activities.

Adding a Timed Activity from the Activity Log

1. From the Contact View, tap the **Contact View** tab to display the modules drop-down list.

2. Tap **Activity Log** to open the **ActLog** tab.

3. Tap the **New** button to open the **Activity Details** tab.

4. Enter the activity information and then tap the **Done** button to save the activity.
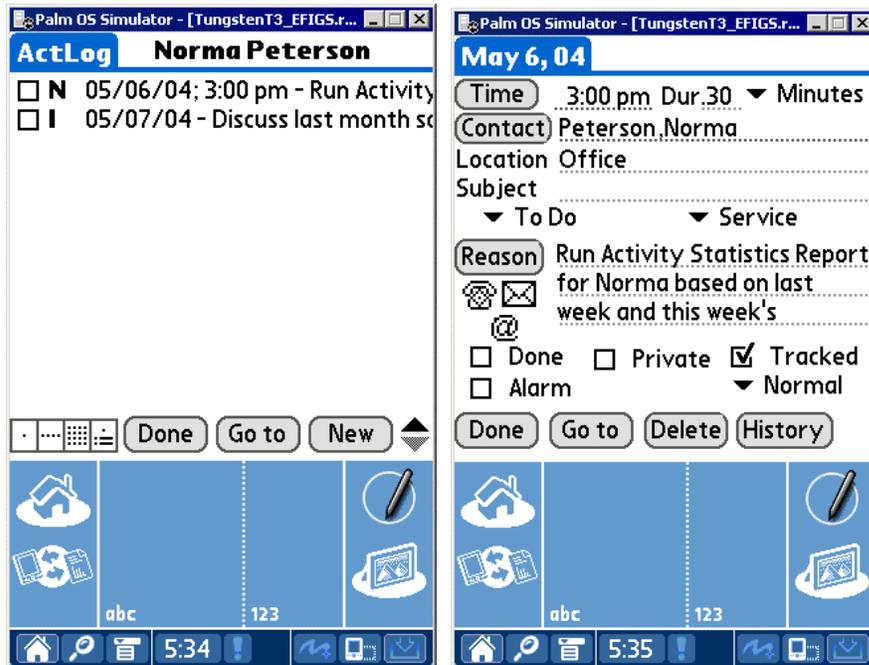

Adding an Non-timed Activity from the Activity Log

1. From the Contact View, tap the **Contact View** tab to display the modules drop-down list.

2. Tap **Activity Log** to open the **ActLog** tab.

3. Tap the **New** button to open the **Activity Details** tab.

4. Enter the activity information without entering a time and then tap the **Done** button to save the activity.

SmartPad

SmartOffice® Mobile is used to view, add, and delete **SmartPad** records that are synchronized with the SmartOffice database. Note that only those **SmartPad** entries that are added with SmartOffice Mobile for Palm OS® that are not synchronized with SmartOffice can be modified.

Adding a SmartPad Note

1. From the **Contact View** tab, tap **Contact View** and then select **SmartPad** from the drop-down list of modules to display the **SmartPad** tab.
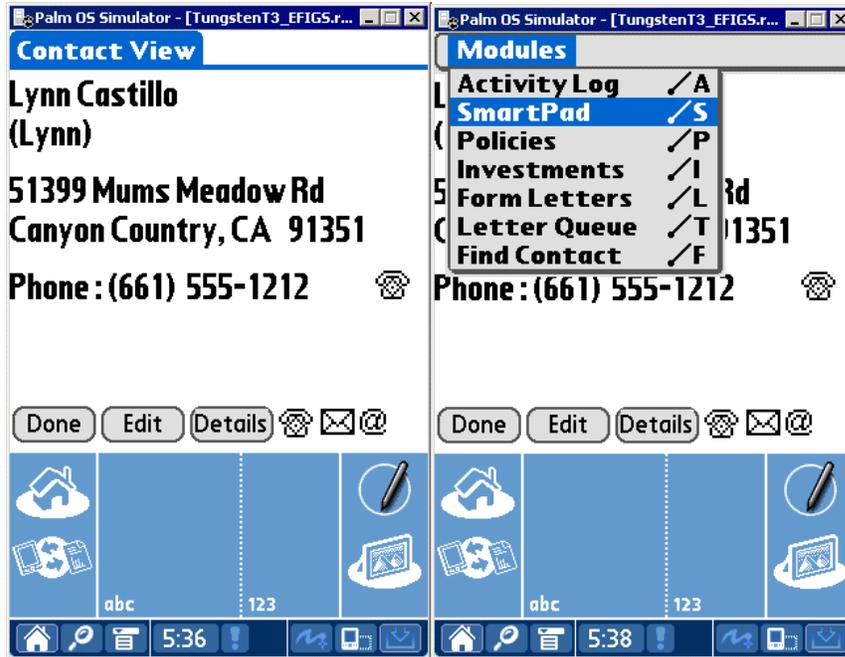
2. Tap the **New** button to display the **Details** tab. Enter the SmartPad note and then tap the **Done** button to save the additions.
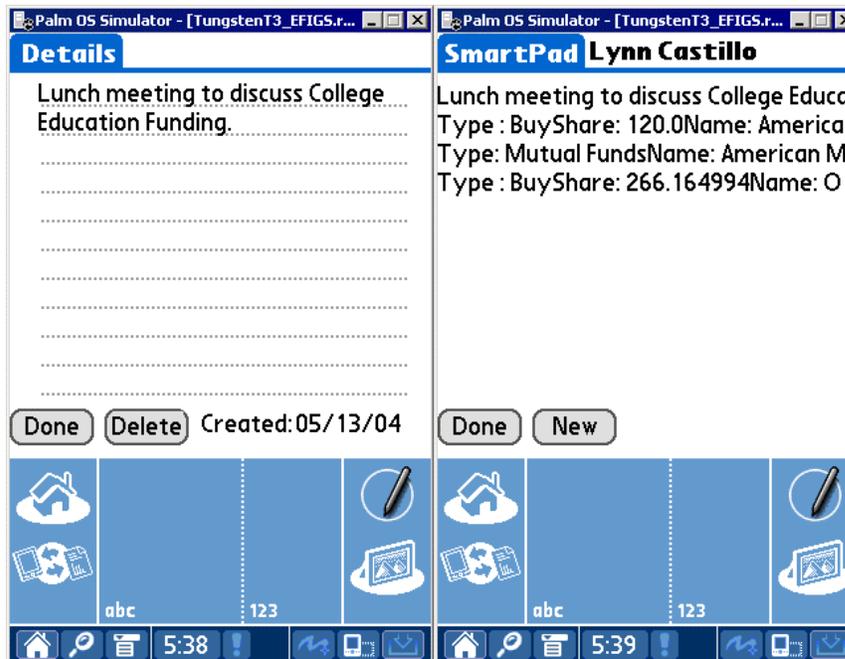
Deleting a SmartPad Note

1. From the **Contact View** tab, tap **Contact View** and then select **SmartPad** from the drop-down list of modules to display the **SmartPad** tab.

2. Tap the SmartPad note for deletion to open the **Details** tab.

3. Tap the **Delete** button to open the Delete Record dialog box.

4. Tap the **OK** button to delete the selected record from the palm device and the server.

Policies

SmartOffice is used to display the **Policies**, **Policy Details**, **Interested Parties**, and **Totals** tabs on the PDA.

Note: Policy information is read-only and cannot be added, modified or deleted from the PDA.

Accessing Policy Information

1. From the **Contact View** tab, tap **Contact View** and then select **Policies** from the drop-down list of modules to display the **Policies** tab.
2. Tap the policy to display the **Policy Details** tab.
3. Tap the **IntPrty** icon to display the **Interested Parties** tab.
4. Tap the **Done** button and then tap the **Done** button again to return to the **Policies** tab.
5. Tap the **Totals** icon to display the **Totals** tab.

Investments

The **Investments**, **Investment Details**, and **Investment Totals** tabs show read-only investment information for the Contact. The Variable Annuity information is limited due to this restriction.

Accessing Investment Information

1. From the **Contact View** tab, tap **Contact View** and then select **Investments** from the drop-down list of modules to display the **Investments** tab.
2. Tap the investment to display the **Investment Details** tab.
3. Tap the **Done** button and then tap the **Totals** button display the **Investment Totals** tab.

Investments — Joseph Ackerman

Investment Name	Value
Amgen Corporation	51562.21
General Electric Capital Cor	44655.90
ATT 8.8 2010	138339.60
AT&T	63237.40
Cash	60000.00
Federal Natl Mtg Assn Mtn	80143.86
American Skandia	131766.04

[Done] [Totals]

Investment Details

Security Type	Stocks
Invest Name	Amgen Corporation
Account #	00234567956
Purchase Cost	54000.00
Tax Cost	54000.00
Shares/ Date	794.12 08/24/01
Price/Date	64.93 07/22/02
Current Value	51562.21

[Done]

Investment Totals

Cost :	449971.
Tax Basis :	429128.
Value :	545092.16

[Done]